EMPLOYMENT OUTLOOK SURVEY: Second Quarter 1984
Manpower, Inc.

SUMMARY OF RESULTS

The following table shows the percentage of over 11,400 employers in 350 U.S. cities who plan to increase or decrease the size of their workforce during the second quarter of 1984 (April, May June), with comparisons for the second quarter of 1983 and first quarter, 1984.

	% Planning Increase			% Planning Decrease		
	2nd Qtr. '84	2nd Qtr. '83	1st Qtr. '84	2nd Qtr. '84	2nd Qtr. '83	1st Qtr. '84
National	30	21	22	5	8	12
South	32	23	25	5	7	9
Midwest	31	23	19	5	8	14
West	30	23	23	5	11	12
Northeast	27	17	21	5	8	11

National — The job outlook for the 2nd quarter of 1984 is the best reported for any comparable quarter since 1978. Significantly, only 5% of employers plan to reduce their workforce next quarter--the lowest percentage ever recorded by the survey.

South — Employment opportunities next quarter will continue to be somewhat better in the South than elsewhere; almost one-third of all employers polled predict increased hiring. The outlook in the durable goods category is particularly bullish, with excellent job prospects also in the non-durable goods, education, transportation/public utilities, and finance sectors.

West — In every sector but one--mining--the 2nd quarter results show the highest anticipated employment levels in at least four years. Hiring expectations are sharply better than a year ago in all ten industry categories, with job prospects strongest in services, education, and wholesale/retail sectors.

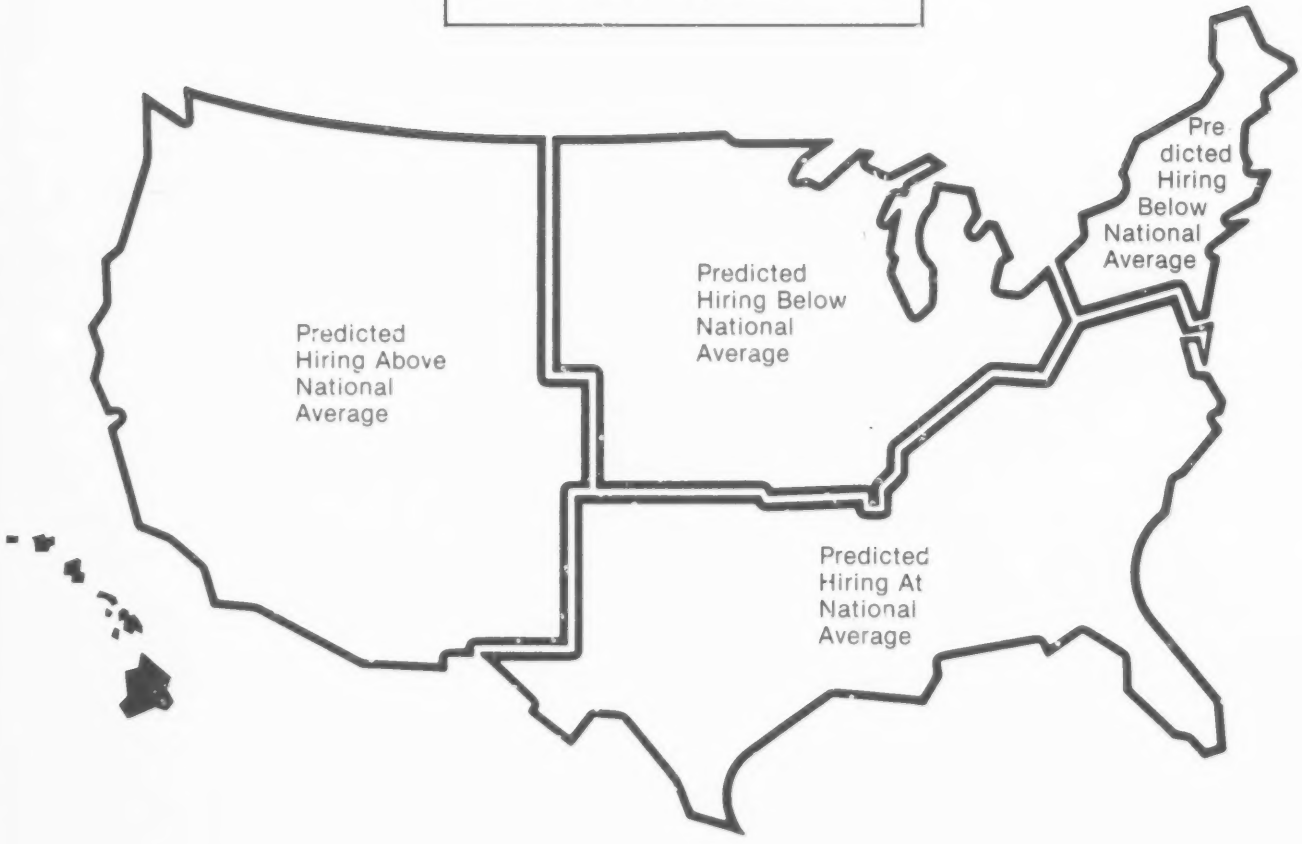
Midwest — The most dramatic upswing in the employment outlook is seen here, with more employers planning hiring and fewer planning cutbacks than a year ago in every category. Construction hiring in particular is expected to rebound strongly, with 52% of employers reporting hiring intentions.

Northeast — Northeastern employers predict the strongest hiring intentions for any 2nd quarter in the past six years. Compared with 1983, hiring expectations are up significantly in all industry categories, and are higher in the services sector than at any time in the survey's history.

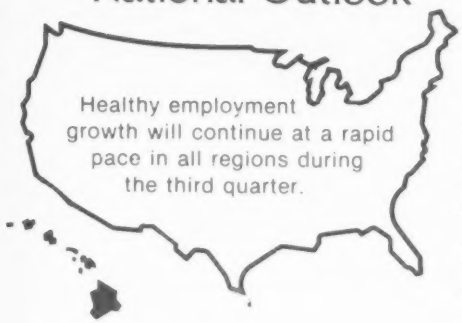
Manpower, Inc. Employment Outlook Survey

Third Quarter
July, August, September
1984

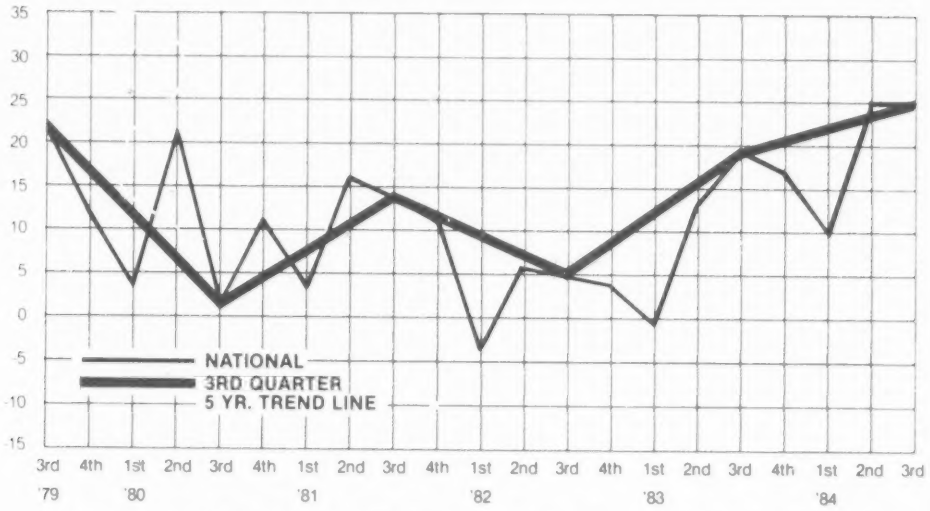
Healthy employment growth will continue at a rapid pace in all regions during the third quarter.


Predicted Hiring Above National Average
Predicted Hiring Below National Average
Predicted Hiring At National Average
Predicted Hiring Below National Average

National Outlook



MEASURE OF HIRING EXPECTATIONS*



Note: The annual trend line represents net employment expectations for the current quarter in relation to the same periods of previous years. These figures are not adjusted for seasonal variations.

*The Measure of Hiring Expectations is the difference between the percentage of employers predicting staff increases and those planning to decrease hiring activity.

Continuing growth in employment for the third quarter of 1984 is the conclusion of the Manpower Employment Outlook Survey after more than 11,700 interviews in over 350 cities.

Following the strongest quarterly outlook in five years, the forecast continues to be very bright, although Construction and Manufacturing employers share in the continuing strength to a slightly lesser degree. Seasonal increases are expected in the Wholesale/Retail and Education sectors.

The overall number of firms still seeking additional workers is unusual considering the strength of the previous quarter. However, when compared to the third quarters of the past two years, it is apparent that employee lists had been depleted by the recession and substantial increases were needed to accommodate the recovery that has occurred. A total of 31% of companies responding to the survey still plan additions, while a significantly low 6% expect staff cutbacks.

The current hiring projections are among the highest recorded in the 8-year history of the survey and provide a strong indication that the present economic expansion will continue through the summer and early fall.

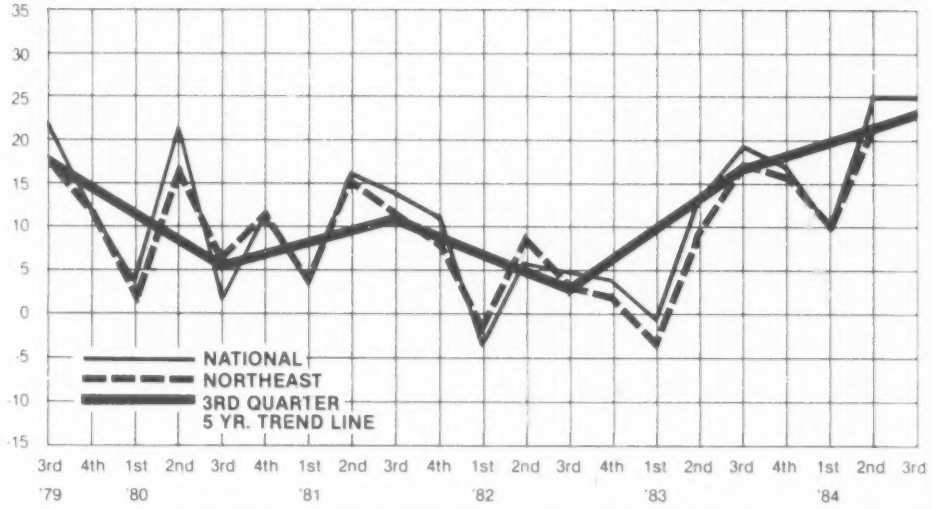
Regionally, the outlook in the Midwest and West, emerging from the recession at a deliberate pace, shows continuing strength. In Southern states, where earlier outlooks were particularly strong, the expansion rate is expected to equal the national average. The Northeast, while somewhat more positive than last quarter, remains a bit below the national average.

Industry Category	Increase %	No Change %	Decrease %	Don't Know %
Mining	25	63	6	6
Construction	44	48	5	3
Manufacturing—Durable Goods	34	57	6	3
Manufacturing—Non-durable Goods	28	65	5	2
Transportation & Public Utilities	25	66	6	3
Wholesale & Retail Trade	33	61	4	2
Finance, Insurance & Real Estate	27	64	7	2
Education—Public & Private	20	68	10	2
Services	29	61	7	3
Public Administration	26	64	7	3
All Industries	31	60	6	3

Northeast

Connecticut
Maine
Massachusetts
New Hampshire
New Jersey
New York
Pennsylvania
Rhode Island
Vermont

MEASURE OF HIRING EXPECTATIONS



Note The annual trend line represents net employment expectations for the current quarter in relation to the same periods of previous years. These figures are not adjusted for seasonal variations.

Buoyed by a seasonal peak in the Construction industry and among Wholesale/Retail firms, Northeastern employers continue to foresee a very favorable hiring outlook that approaches the national average. Not since the middle of 1978 has the picture been so bright in this region.

Less favorable pictures are forecast by Non-Durable Goods Manufacturers and in the Services sector, where outlooks are improved from last year, but not up to the brisk pace of last quarter. The Education field shows markedly less propensity to trim employment. The 14% of schools planning to increase staff is not unusually high, but the 7% predicting decreases is the lowest for a third quarter in the survey's history. This trend has existed throughout 1984.

Industry Category	Increase %	No Change %	Decrease %	Don't Know %
Mining*				
Construction	40	49	6	5
Manufacturing—Durable Goods	31	58	6	5
Manufacturing—Non-durable Goods	24	66	7	3
Transportation & Public Utilities	24	66	6	4
Wholesale & Retail Trade	33	61	3	3
Finance, Insurance & Real Estate	27	61	6	6
Education—Public & Private	14	77	7	2
Services	27	62	7	4
Public Administration	20	71	8	1
All Industries	28	63	5	4

* The size of the mining industry's responding sample does not permit a hiring trend forecast.

EMPLOYMENT OUTLOOK SURVEY: Third Quarter 1984
Manpower, Inc.

SUMMARY OF RESULTS

The following table shows the percentage of over 11,700 employers in 354 U.S. cities who plan to increase or decrease the size of their workforce during the third quarter of 1984 (July, August, September), with comparisons for the third quarter of 1983 and second quarter, 1984.

	% Planning Increase			% Planning Decrease		
	3rd Qtr. '84	3rd Qtr. '83	2nd Qtr. '84	3rd Qtr. '84	3rd Qtr. '83	2nd Qtr. '84
National	31	27	30	6	8	5
West	34	30	30	6	9	5
Midwest	31	26	31	7	6	5
South	31	28	32	6	7	5
Northeast	28	24	27	5	7	5

National — Employment in the third quarter will continue to grow at the rapid pace set earlier this year. Most industries maintain a healthy hiring outlook, but a cautionary pause seems present in the hiring plans of Durable Goods Manufacturers and Construction firms.

West — Not since 1978 has the West anticipated so positive a hiring outlook. Wholesale/Retail firms and Durable Goods Manufacturers expect the most job opportunities. Prospects are a bit weaker than last quarter in Non-Durable Goods Manufacturing. Services employers are a notch ahead of last quarter and last year.

Midwest — Non-Durable Goods Manufacturers, Construction companies and particularly Wholesale/Retail firms exceed seasonal hiring expectations, providing the Midwest with a bright picture. Other industries should maintain employment at or near present levels.

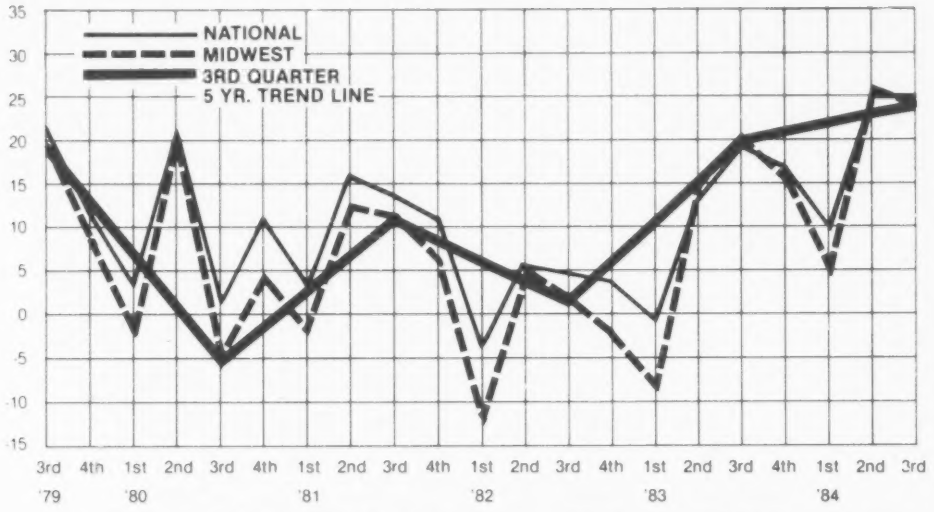
South — The outlook for Southern employment continues to be positive, although down slightly from last quarter. Educational institutions seem to be reaching their hiring peak a bit early this year. The Construction industry reflects seasonal optimism. Most noticeable decline is in the forecast for Services Firms.

Northeast — Buoyed by a seasonal peak in Construction and among Wholesale/Retail firms, Northeastern employers continue to foresee a very favorable hiring outlook that approaches the national average. Not since mid-1978 has the picture been so optimistic in this region.

Midwest

Illinois
Indiana
Iowa
Kansas
Michigan
Minnesota
Missouri
Nebraska
North Dakota
Ohio
South Dakota
Wisconsin

MEASURE OF HIRING EXPECTATIONS



Note: The annual trend line represents net employment expectations for the current quarter in relation to the same periods of previous years. These figures are not adjusted for seasonal variations.

Although appearing to have an outlook similar to last quarter, the picture in the Midwest is much brighter than it appears, since several key employment sectors exceed their normal third quarter seasonal positions.

The Construction industry, for example, is customarily active at this season, but this is one of the most optimistic third quarters for construction employment in the survey's 8-year history. The same is true for Non-Durable Goods Manufacturers. Wholesale/Retail firms foresee employment levels that significantly exceed seasonal trends. Even the Education sector, which normally shows employment declines in the third quarter in the Midwest, is now slightly positive for the first time, although still somewhat below the level of last quarter.

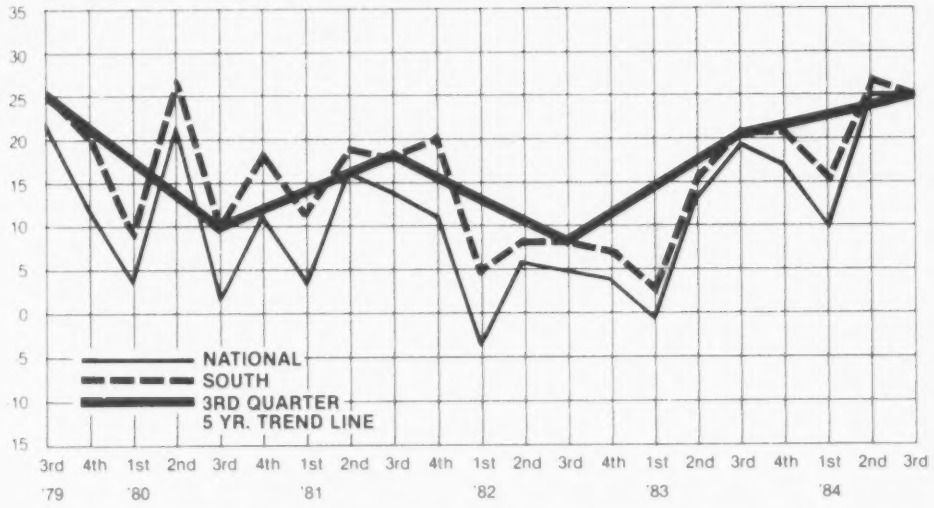
Jobs in Public Administration, however, will be down significantly from last quarter. Opportunities in the Services sector, Finance/Insurance/Real Estate and in the Transportation/Public Utilities sector will remain at last quarter's level.

Industry Category	Increase %	No Change %	Decrease %	Don't Know %
Mining*				
Construction	51	43	5	1
Manufacturing—Durable Goods	35	56	7	2
Manufacturing—Non-durable Goods	32	62	4	2
Transportation & Public Utilities	25	65	9	1
Wholesale & Retail Trade	32	63	4	1
Finance, Insurance & Real Estate	26	67	6	1
Education—Public & Private	17	67	15	1
Services	28	62	9	1
Public Administration	19	70	8	3
All Industries	31	61	7	1

* The size of the mining industry's responding sample does not permit a hiring trend forecast.

Alabama
Arkansas
Delaware
District of Columbia
Florida
Georgia
Kentucky
Louisiana
Maryland
Mississippi
North Carolina
Oklahoma
South Carolina
Tennessee
Texas
Virginia
West Virginia

MEASURE OF HIRING EXPECTATIONS



Note The annual trend line represents net employment expectations for the current quarter in relation to the same periods of previous years. These figures are not adjusted for seasonal variations.

The outlook for Southern employment continues to be positive. Although down slightly from last quarter, the survey nonetheless reflects the most optimistic third quarter view in 6 years. Economic growth stalled less severely in the South during the recession, so there is less opportunity for the dramatic rebound experienced in some other areas.

Strong industries in the coming quarter include the Construction industry, which reflects seasonal improvement, and Durable Goods Manufacturers, who expect employment increases to reach the highest levels of any past third quarter. Public Administration employers anticipate more hiring than in recent quarters and Public and Private Educational Institutions appear to be reaching the peak of their hiring cycle a bit early this year.

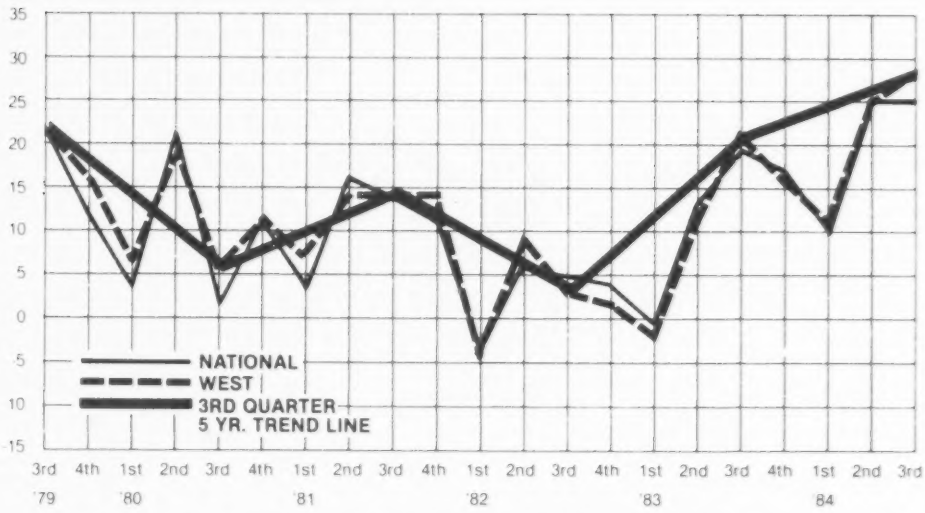
Service industries, on the other hand, anticipate a decline in employment growth from last quarter and last year.

Industry Category	Increase %	No Change %	Decrease %	Don't Know %
Mining	22	67	4	7
Construction	44	50	4	2
Manufacturing — Durable Goods	36	58	4	2
Manufacturing — Non-durable Goods	29	64	6	1
Transportation & Public Utilities	27	66	4	3
Wholesale & Retail Trade	33	60	5	2
Finance, Insurance & Real Estate	29	65	5	1
Education — Public & Private	24	69	5	2
Services	28	61	8	3
Public Administration	29	61	6	4
All Industries	31	61	6	2

West

Arizona
California
Colorado
Hawaii
Idaho
Montana
Nevada
New Mexico
Oregon
Utah
Washington
Wyoming

MEASURE OF HIRING EXPECTATIONS



Note: The annual trend line represents net employment expectations for the current quarter in relation to the same periods of previous years. These figures are not adjusted for seasonal variations.

Prospects for employment improvement are somewhat better for the coming quarter than in the prior quarter.

The number of construction jobs, though still growing, should not reach the level of last quarter. Durable Goods Manufacturers and Wholesale/Retail firms must go back to mid-1978 to find as optimistic a quarter as the coming three months. Non-Durable Goods Manufacturers, however, report opportunities sliding slightly from earlier 1984 periods and from the third quarter of 1983. Educational Institutions, which have not experienced positive job opportunities in recent years, are now in the midst of their most optimistic year since 1977. Service employers are a notch ahead of last quarter and last year, while the picture for Public Administration is much more positive.

Not since mid-1978 has the Western area experienced so positive an outlook for any three-month period.

Industry Category	Increase %	No Change %	Decrease %	Don't Know %
Mining	27	52	14	7
Construction	33	54	10	3
Manufacturing—Durable Goods	37	53	5	5
Manufacturing—Non-durable Goods	29	59	8	4
Transportation & Public Utilities	26	63	6	5
Wholesale & Retail Trade	38	55	4	3
Finance, Insurance & Real Estate	25	63	10	2
Education—Public & Private	23	60	11	6
Services	35	56	5	4
Public Administration	35	56	4	5
All Industries	34	56	6	4

MANPOWER
TEMPORARY SERVICES
International Headquarters
5301 N. Ironwood Road, Milwaukee, WI 53217

The quarterly Employment Outlook Survey is conducted as a public service of Manpower, Inc. The survey was designed and is administered by Manpower's International Research Department, utilizing a statistically representative sample of more than 11,700 large public and private employers from among ten industrial sectors in 354 U.S. cities.

The third quarter 1984 survey is a measurement of employment plans for the permanent workforce and is based upon interviews conducted with the survey sample immediately prior to June 1, 1984.

The survey results reflect the intentions of the sample employers interviewed. Some of these intentions may change unexpectedly upon the conclusion of the survey.

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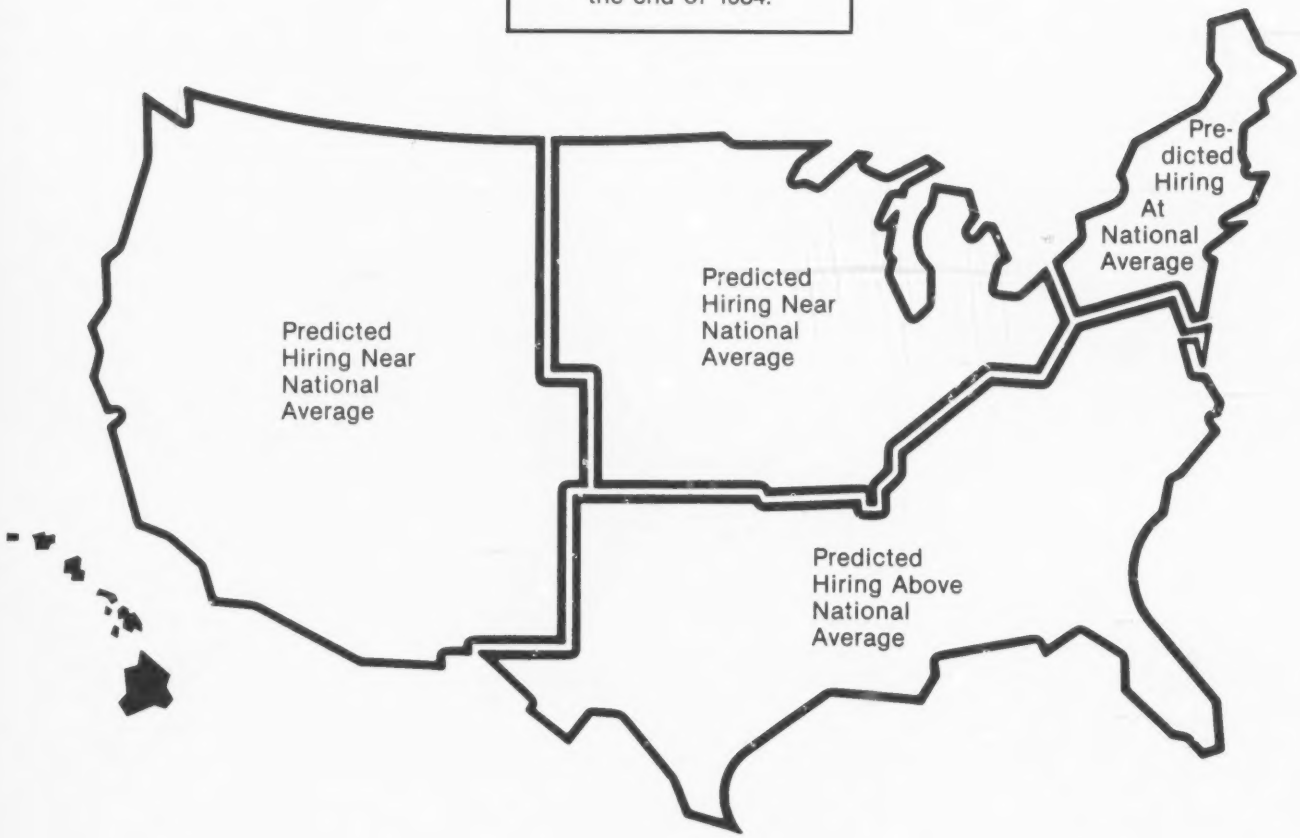
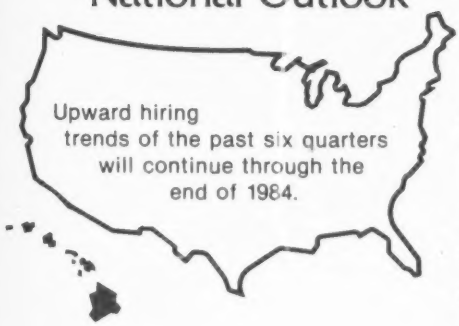
Manpower, Inc. Employment Outlook Survey

Fourth Quarter
October, November, December
1984

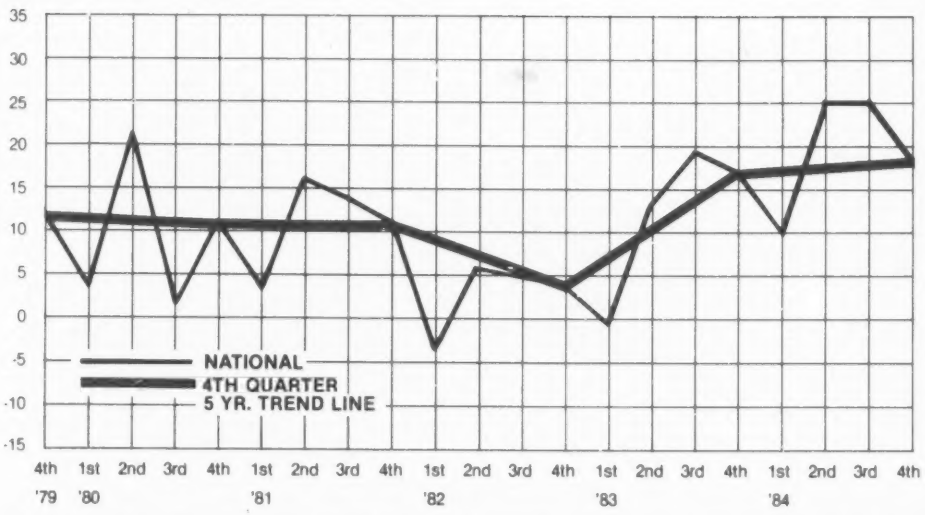
Upward hiring trends of the past six quarters will continue through the end of 1984.


Predicted Hiring Near National Average
Predicted Hiring Near National Average
Predicted Hiring At National Average
Predicted Hiring Above National Average

National Outlook



MEASURE OF HIRING EXPECTATIONS*



Note: The annual trend line represents net employment expectations for the current quarter in relation to the same periods of previous years. These figures are not adjusted for seasonal variations.

*The Measure of Hiring Expectations is the difference between the percentage of employers predicting staff increases and those planning to decrease hiring activity.

The nation's business firms will continue to expand their workforce at an above-average pace during the fourth quarter, according to the latest Manpower, Inc. Employment Outlook Survey.

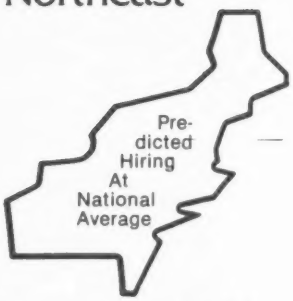
The survey of 11,700 U.S. firms indicates that 26% of all firms intend to hire more people in the quarter ahead while only 8% of the firms will reduce their workforce. The 26% figure is exactly the same as that of one year ago but down from the 30% hiring factors present in the past two quarters. Another 63% see no change in present levels and 3% are not sure of fourth quarter plans.

The thrust is less robust than in the spring and summer quarters of this year but nevertheless indicates a continuation of the upward hiring trends of the past six quarters. The staff reduction figure of 8% is the lowest ever recorded for a fourth quarter in the nine-year history of the survey.

Following a period of very active hiring in the first three quarters of this year, there is a visible pause taking place right now as the summer period ends but no indication that the hiring recovery has stopped. On balance, the net quarter hiring strength as evidenced by the survey is as strong as has been seen since 1978 and should continue.

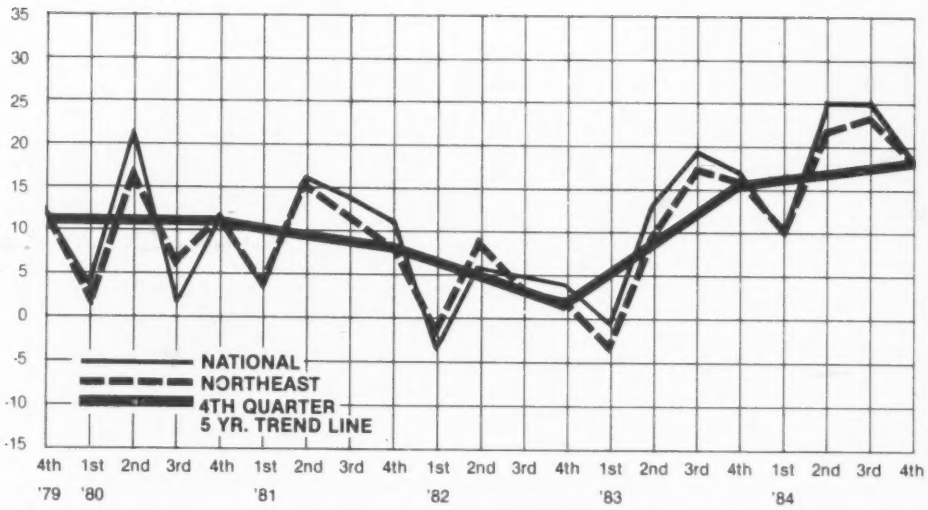
Industry Category	Increase %	No Change %	Decrease %	Don't Know %
Mining	24	66	9	1
Construction	23	59	15	3
Manufacturing—Durable Goods	27	60	9	4
Manufacturing—Non-durable Goods	25	63	8	4
Transportation & Public Utilities	20	69	8	3
Wholesale & Retail Trade	35	54	8	3
Finance, Insurance & Real Estate	22	67	8	3
Education—Public & Private	25	66	5	4
Services	23	65	9	3
Public Administration	23	65	9	3
All Industries	26	63	8	3

Northeast



Connecticut
Maine
Massachusetts
New Hampshire
New Jersey
New York
Pennsylvania
Rhode Island
Vermont

MEASURE OF HIRING EXPECTATIONS



Note: The annual trend line represents net employment expectations for the current quarter in relation to the same periods of previous years. These figures are not adjusted for seasonal variations.

The outlook in the Northeast closely approximates the national average, as the area turned in its most optimistic fourth quarter outlook since 1978. Wholesale-Retail trades, riding the crest of a seasonal high, will match the highly favorable plans of a year ago. Finance, Insurance and Real Estate jobs will continue to be plentiful, at least until year-end. This industry has shown continuing strength in the Northeast area in recent years. The picture is substantially brighter among Public and Private Educators and Public Administration employers continue to show plans to add staff, even at the end of a steadily optimistic year.

Durable Goods Manufacturing shows a gradually slowing pace, as hiring plans are a notch below last quarter and last year. Among Non-Durable Goods Manufacturers, the trend lags behind last quarter, but is a bit ahead of the fourth quarter last year.

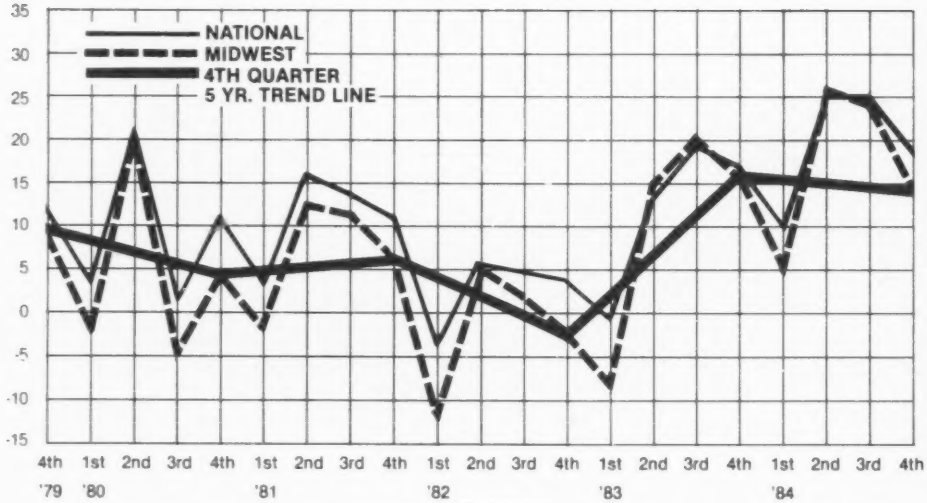
Industry Category	Increase %	No Change %	Decrease %	Don't Know %
Mining*				
Construction	20	66	12	2
Manufacturing—Durable Goods	26	60	9	5
Manufacturing—Non-durable Goods	23	65	6	6
Transportation & Public Utilities	17	68	8	7
Wholesale & Retail Trade	34	54	7	5
Finance, Insurance & Real Estate	27	61	5	7
Education—Public & Private	22	64	2	12
Services	24	63	7	6
Public Administration	18	70	7	5
All Industries	25	62	7	6

* The size of the mining industry's responding sample does not permit a hiring trend forecast.

Midwest

Illinois
Indiana
Iowa
Kansas
Michigan
Minnesota
Missouri
Nebraska
North Dakota
Ohio
South Dakota
Wisconsin

MEASURE OF HIRING EXPECTATIONS



Note: The annual trend line represents net employment expectations for the current quarter in relation to the same periods of previous years. These figures are not adjusted for seasonal variations.

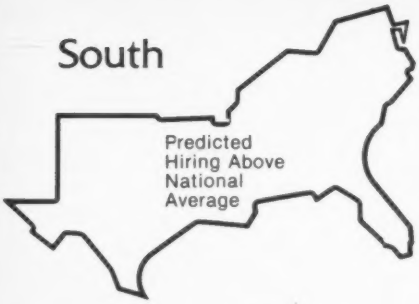
As cold weather takes over, the Midwest suffers a drop in Construction activity, although the drop in jobs this year is not as great as usual. Holiday staffing plans among Wholesale-Retail firms are near the very high level of earlier 1984 quarters. Education workers are in demand in response to a much improved outlook. Service firms and Public Administration, normally sluggish toward year-end, are near their seasonal norms.

Durable Goods Manufacturers are not optimistic. Their hiring plans are below earlier 1984 quarters and last year, but about the same number of producers of Non-Durable Goods will be adding workers as in last year's final quarter. The forecast by Transportation and Public Utilities firms continues a somewhat sluggish trend of recent years.

Industry Category	Increase %	No Change %	Decrease %	Don't Know %
Mining*				
Construction	16	66	17	1
Manufacturing—Durable Goods	25	62	10	3
Manufacturing—Non-durable Goods	27	60	11	2
Transportation & Public Utilities	16	74	9	1
Wholesale & Retail Trade	34	56	8	2
Finance, Insurance & Real Estate	22	72	5	1
Education—Public & Private	21	73	5	1
Services	19	68	12	1
Public Administration	17	67	14	2
All Industries	24	64	10	2

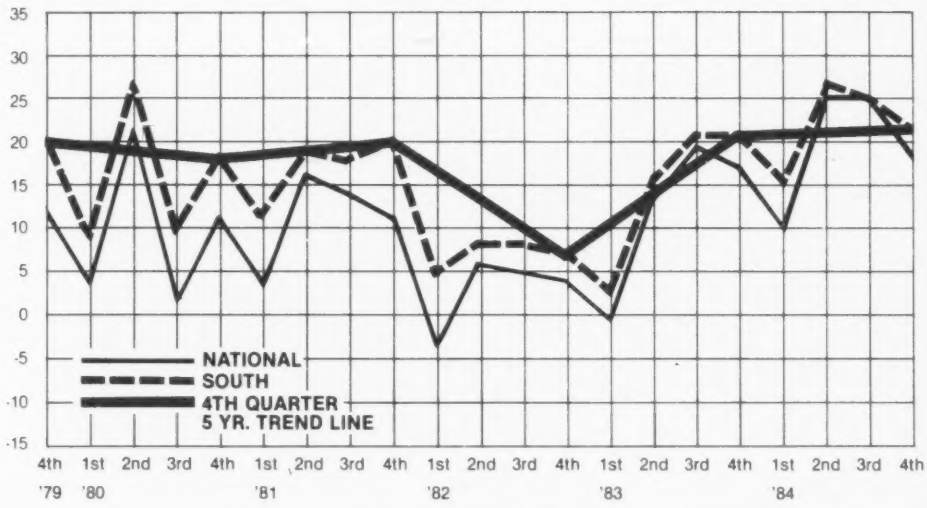
* The size of the mining industry's responding sample does not permit a hiring trend forecast.

South



Alabama
Arkansas
Delaware
District of Columbia
Florida
Georgia
Kentucky
Louisiana
Maryland
Mississippi
North Carolina
Oklahoma
South Carolina
Tennessee
Texas
Virginia
West Virginia

MEASURE OF HIRING EXPECTATIONS



Note: The annual trend line represents net employment expectations for the current quarter in relation to the same periods of previous years. These figures are not adjusted for seasonal variations.

Once again the South stands a head above other geographic areas, a trend that seems accentuated in the cold weather months.

Both Durable and Non-Durable Goods Manufacturers are down slightly from the quickened pace of early 1984 quarters, but are nonetheless ahead of planned hiring last year.

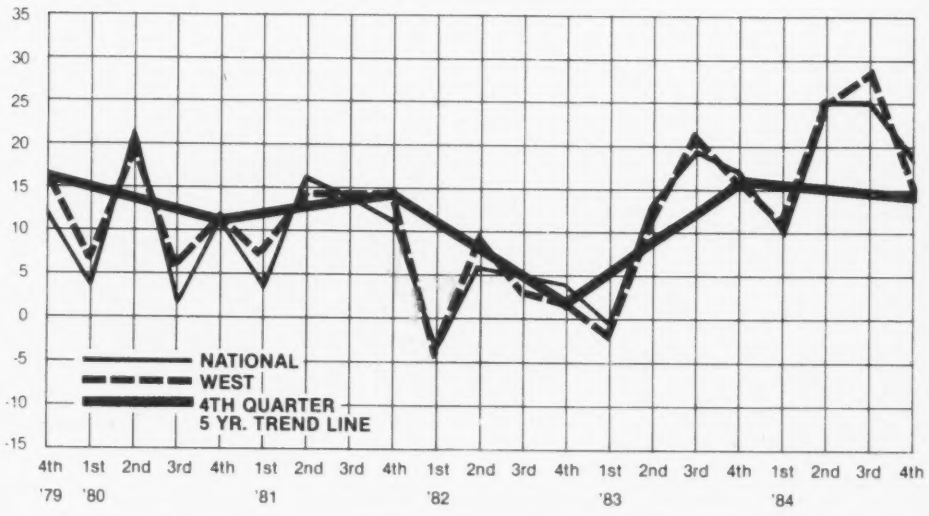
Wholesale-Retail employers are the most aggressive in the nation in their hiring plans. Educational institutions continue the favorable hiring trend established in earlier quarters. Opportunities for Services sector jobs are also better than the national average and Mining companies expect to close a strong year on a highly favorable note, and Public Administration employers continue to foresee staff additions. This trend has increased steadily since mid-1983.

Industry Category	Increase %	No Change %	Decrease %	Don't Know %
Mining	25	66	9	0
Construction	30	55	13	2
Manufacturing—Durable Goods	31	54	11	4
Manufacturing—Non-durable Goods	25	63	8	4
Transportation & Public Utilities	24	67	7	2
Wholesale & Retail Trade	38	54	5	3
Finance, Insurance & Real Estate	22	68	8	2
Education—Public & Private	29	66	3	2
Services	26	64	8	2
Public Administration	29	60	8	3
All Industries	30	59	8	3

West

Arizona
California
Colorado
Hawaii
Idaho
Montana
Nevada
New Mexico
Oregon
Utah
Washington
Wyoming

MEASURE OF HIRING EXPECTATIONS



Note: The annual trend line represents net employment expectations for the current quarter in relation to the same periods of previous years. These figures are not adjusted for seasonal variations.

Hiring patterns in the Western states conform rather closely to those in most other regions. Though positive, the outlook is not exceptional. The picture is dimmed compared not only to last quarter, but to the fourth quarter of last year. Only the fields of Public and Private Education and Public Administration break that pattern.

Plans of Wholesale-Retail firms and Non-Durable Goods Manufacturers are about the same as last year. Sharp declines lie ahead in Durable Goods Manufacturing, Construction, Mining, Transportation and Public Utilities, and Finance, Insurance and Real Estate.

Industry Category	Increase %	No Change %	Decrease %	Don't Know %
Mining	22	61	17	0
Construction	21	52	21	6
Manufacturing—Durable Goods	27	56	10	7
Manufacturing—Non-durable Goods	18	72	7	3
Transportation & Public Utilities	20	68	10	2
Wholesale & Retail Trade	36	51	9	4
Finance, Insurance & Real Estate	15	70	12	3
Education—Public & Private	23	69	5	3
Services	20	65	11	4
Public Administration	24	66	6	4
All Industries	24	62	10	4

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The quarterly Employment Outlook Survey is conducted as a public service of Manpower, Inc. The survey was designed and is administered by Manpower's International Research Department, utilizing a statistically representative sample of more than 11,700 large public and private employers from among ten industrial sectors in 358 U.S. cities.

The fourth quarter 1984 survey is a measurement of employment plans for the permanent workforce and is based upon interviews conducted with the survey sample immediately prior to September 1, 1984.

The survey results reflect the intentions of the sample employers interviewed. Some of these intentions may change unexpectedly upon the conclusion of the survey.